STATE OF THE USC ALUMNI ASSOCIATION 2008

As we consider this year’s accomplishments of the USC Alumni Association, it is important to consider who we serve. I recently came across an article on the meaning of the word “alumni.” According to this article, the etymological root of the word is the Latin verb *alere*, which means “to bring up” or “to nourish.” In Latin literature, the term *alumnus* was used to describe “he who is nourished by a person who is not a natural parent.” Starting from this original definition then, the term “alumni” is a fitting way to describe our constituents, who continue to receive professional, intellectual and social nourishment from USC.

This year has been a resounding success for the USC Alumni Association. We have seen the reinvigoration of the USC Alumni Association’s volunteer leaders and staff, and we have inspired the Trojan Family and USC community to view the USC Alumni Association as a strategic university asset which must be developed. These effects are palpable throughout our organization and the university.

**VOLUNTEER ENGAGEMENT**

The year began with one of the best Alumni Leadership Conferences in recent history. We had record attendance, and enthusiastic participation throughout. The conference began with a briefing on my initial impressions of the program, which was well-received. We enjoyed the presence of the provost and several deans at our Friday luncheon, which was mutually informative. Finally, we ended with a brainstorming session on how the USC Alumni Association could engage alumni for life, build a culture of philanthropy at USC, and gather a voice for alumni. The alumni leaders and staff were challenged by these topics and embraced them wholly. The conference set the tone for the year.

One particular source of pride has been the swift reinvigoration of the Board of Governors (BOG). Our goal with the board has been to fully disclose what’s going on at the alumni association and to engage them in their advisory capacity in planning. We disclosed detailed budget information to the Board of Governors, who appreciated being entrusted with this information. We have also begun reserving time in each agenda for discussion; we recently discussed the potential impact of commercial online networking sites on our own online community.

Michele Dedeaux Engemann has been an ideal president during this year. She has been extremely generous with her time and energy, and she has gone out of her way to support me. I appreciate her constant attention to how things are being perceived by the BOG and the leaders of local clubs and women’s groups. Michele is a volunteer who always follows through on her commitments and can always be counted on.

I am equally enthusiastic about Dick DeBeikes’ presidency. Dick will bring his strong business acumen to our programs and is committed to the program priorities we have outlined this year. I anticipate that Dick and his wife Bryn will be equally generous with their time and
energy, and will be helpful in developing our presence in Orange County and relations with other campus partners.

In addition to the Board of Governors, former alumni presidents and other central alumni leaders, we have exercised considerable efforts at cultivating the leaders of the university’s regional alumni clubs and alumnae support groups. When I arrived, I was surprised by the extent to which these groups operated independently from the alumni association. The groups were not a priority of the alumni association’s strategic agenda; they in turn did not actively prioritize the alumni association in their own planning.

Fortunately, we have been very successful in reaching out to the alumnae groups. I regularly attend meetings of the Alumnae Coordinating Council and Town and Gown of USC, and I have befriended several members of these groups. The alumnae leaders have been very receptive to our agenda, and our readiness to include them. Two of the groups have made significant contributions toward the Epstein Family Alumni Center, and we expect a third to do so before the end of the year. When I started at USC, I was told about the influence and commitment of these groups, and I have since observed it firsthand. The alumnae groups have been warm and welcoming and have responded well to our agenda; they will be great allies going forward.

This year I put a high priority on understanding the histories and goals of the regional clubs and working with their volunteer leaders to bring them into alignment with the university’s expectations. I have personally met with regional leaders from the following areas: Los Angeles, Orange County, San Francisco, San Diego, Seattle, Palm Springs, Santa Barbara, Phoenix, Tucson, Chicago, Kansas City, Boston, Washington, D.C., Richmond, New York, Portland, and Philadelphia. My colleagues have also worked closely with leaders in Dallas, Houston and Atlanta, and with new groups in Cincinnati, Miami and Minneapolis.

We have developed close relations with several of the regional leaders and have received consistent support from them for growing the program in a direction where the regional clubs and alumni association staff work much more collaboratively in developing our regional program. The club leaders are generally favorable to our building an alumni relations department that specifically supports them. Our plan includes providing each of our priority regions with an operating budget to initiate and support regional programming and communications, so that we can better engage all USC alumni.

Admittedly, we have had issues arise surrounding the weekender programs (away football game events). Effective next year, the alumni association staff will undertake logistics and administration of the weekender programs to consolidate program expenses, streamline administration and ensure compliance with university policies. We also developed a plan in consultation with the BOG Executive Committee and senior administration to use the revenue from the weekenders to support regional programming around the nation.

Leaders in the clubs with weekenders reacted negatively to this change, mostly regarding the loss of revenue. In response to their concerns, I proposed that we split the revenue for the next two years. In addition, we are working with the USC Annual Fund to develop other sources of support for regional club scholarships. After much discussion, several of the affected clubs have agreed to give this new program a chance and participate. We hope to convince the leaders of the few remaining clubs to participate as well.
Our international clubs remain a vital part of our agenda. The alumni association hosted a conference for our Asian club leaders during the USC Global Conference in Tokyo in October and introduced our “First Impressions” presentation to them. We frequently provided football game DVDs to our international groups for viewing parties. The alumni association continues to serve as a resource for USC deans and faculty traveling abroad and as a welcome place for international alumni visiting the campus.

Over the summer Grace Shiba and I will be visiting our alumni clubs in Hong Kong, Shanghai, Beijing, Seoul, London, and Paris. We maintain relations with clubs in Tokyo, Taipei and Mexico City, and we have contacts in Dubai, Singapore, Manila, Mongolia, Sydney, and Vancouver. We will develop a plan for our international groups in the next fiscal year, keeping in mind USC’s current effort to position itself as an international university.

CAMPUS PARTNERSHIPS
I am very proud of the progress we have made building partnerships between the USC Alumni Association and a variety of schools, departments and offices around campus. I have developed good relations with the USC deans. In approaching the deans, I have been forthright in our agenda and receptive to theirs. We have a lot in common, and I appreciate the deans’ open-mindedness and candor.

We have also developed good relations with Dean Catherine Quinlan of the USC Libraries and Krisztina Holly from the USC Stevens Institute for Innovation. As central-based entities, we have a common outlook on our prospective audience. There is great potential for each of these relationships. For example, our partnership with the Libraries led to collaboration to provide alumni access to the university’s online databases for the first time. That service begins in the fall.

We reconvened the Alumni Relations Council this year, and invited representatives of all the schools and administrative offices that interact with alumni to participate. The response has been overwhelming, with 85%+ attendance at each meeting.

We hosted a series of regional planning meetings for the Council, and almost every member of the Council participated in at least one session and shared regional goals for next year. This will further our goal of establishing a cohesive programming schedule.

We also recently hosted a roundtable luncheon for the directors of the Black Alumni Association (BAA), the Mexican American Alumni Association (MAAA), the Asian Pacific Alumni Association (APAA), the Lambda LGBT Alumni Association (Lambda), and colleagues from Hillel and the Catholic Center. The purpose of the luncheon was to trade experiences and best practices in developing and strengthening identity-based groups. All of the participants gave us positive feedback and agreed to participate regularly in this forum. We are hosting a similar roundtable for school-based alumni relations staff this summer.

We have developed good relations with colleagues in Athletics, Admissions, Advancement, the Career Center, the Trojan Marching Band, Student Affairs, University Relations, and the Provost’s office. One example of our collaboration is the Alumni Career Services Study Group, which Martha Harris and Michael Jackson convened this spring. Career services director Eileen Kohan and I hosted its first meeting in early May and are confident that our work will yield valuable information and identify new opportunities for USC.
ALUMNI SURVEY
We completed an electronic survey of our alumni this year, using the organizational development consulting firm Performance Enhancement Group (PEG). Almost 8,000 alumni participated in the survey, which measured their perceptions of USC, their student experience and their alumni experience. We found the results incredibly interesting and useful in conceiving future plans for the USC Alumni Association.

We hosted a presentation of the survey results on campus and invited the BOG, the Board of Trustees Alumni Affairs Committee, the Alumni Presidents Council, the Alumni Relations Council, and other members of the senior administration. Over 150 alumni and university leaders were in attendance. Every school and administrative division of the university was represented. We also presented the survey results to alumni leaders throughout the spring.

Our volunteer leaders and campus partners were very interested in the results. We received positive feedback on our willingness to disclose the results and their implications. Most importantly, the survey results demonstrated that several of our priorities are corroborated by data on alumni preferences, rather than based on individual anecdote or whim.

PROGRAMMING
Signature events – Led by Mark McBride, our signature events enjoyed enormous success this year. We had record participation in Homecoming this year and were satisfied with the revenue we earned. For next year, we are reviewing the fees associated with Homecoming and looking for ways we can trim costs further.

The 75th Annual Alumni Awards Gala was, by all measures, a resounding success. Our awardees felt honored and truly special. Our BOG members and staff worked hard and were very proud. Our attendees – a capacity crowd – felt part of the Trojan Family. We ended on time (actually ahead of time). There was a surprise emotional moment involving the father of honoree Christopher Cox, chairman of the Securities and Exchange Commission. President Steven B. Sample presented Charles Cox with his USC diploma 65 years after World War II interrupted his march to graduation. All told, we earned about $90,000 through sponsorships and the silent auction. We expect that next year we will reach our goal of raising $100,000.

Regional programs – One of our key initiatives has been more alumni association-sponsored programming in our regions. During this year, we sponsored or heavily supported the following regional programs:

- Lunch with President Sample for leaders of the Seattle and Portland clubs
- An alumni reception with Provost C.L. Max Nikias in Washington, D.C.
- A reception with Dean Howard Gillman of the USC College of Letters, Arts & Sciences in Orange County
- A book lecture with Executive Vice Provost Barry Glassner in Boston and in New York
- Tailgates before four home basketball games and three away basketball games in Seattle, Phoenix and New York
- Alumni happy hours in Portland, Santa Barbara, Palm Springs, Washington, D.C., Minneapolis, and Philadelphia
- The annual scholarship dinner in San Diego
- The speakers series in Orange County
- An update on USC’s master campus plan in Los Angeles
On July 17th we will be traveling to San Francisco with Dean Carmen Puliafito and two USC doctors from the Keck School of Medicine of USC for a reception, introduction to the dean and update on medical news our alumni can use. On July 9th I will be hosting an alumni happy hour in Chicago.

This year’s programs have helped get the staff in practice for delivering more, smaller programs. They have also given our regional clubs examples of programs we could be doing in their areas. Between the regional planning meetings of the Alumni Relations Council, and the experience gained this year, we have laid a solid foundation for expanding our regional programming over the next few years.

**Lifecycle programs** – This year we hired Patrick Auerbach to lead our efforts to reach out to students, young alumni and other generations. Our student outreach efforts culminated in a Senior Scendoff held on May 1, 2008, on Argue Plaza. Over 425 seniors attended this program, as did several BOG members, who greeted the seniors. We distributed collateral regarding the USC Alumni Association and received lots of positive feedback from seniors about making a connection with us before graduation. We also invited school alumni officers (Marshall and Cinematic Arts attended), the annual fund (for senior class gift) and the *El Rodeo* (for pickup and sales) to participate. We have hired a prominent student leader to further develop these types of programs next year.

In the fall, we hosted an open forum for young alumni. Fifty young alumni attended, and 10 of those alumni committed to serve on a new young alumni council, which hosted a holiday party in December. We also started a group for thirty-somethings (around 15 years out). This group is advising us on programs geared towards alumni with young families and identifying their career needs. With the Career Center, we co-sponsored two career-related seminars focused on generational career needs. Considering these successful beginnings and the long tradition of our Half Century Trojans group, this program area has a lot of potential, and the schools and other campus partners have been interested in collaborating with us.

**Asian Pacific Alumni Association** – The APAA began another successful year with its annual scholarship golf classic, which brought out more than 100 alumni and friends. The APAA also renewed its annual scholarship and awards gala this year. In the evening’s highlight, USC granted honorary alumni status to Nisei students whose studies had been interrupted by the forced internment of Japanese-American citizens during World War II.

The APAA maintains an active commitment to student outreach and regularly works closely with Asian and Asian-American student organizations across campus. On May 15th, the APAA led an effort to establish USC’s first Asian Pacific Graduate Celebration.

**Lambda LGBT Alumni Association** – Lambda approaches its 15th anniversary year having hosted several successful programs this year, including its annual Hollywood Bowl picnic and Homecoming tailgate, and co-sponsored Lavender Graduation. Lambda also hosted its first annual 5K campus run for scholarships and performed community service at Project Angel Food. Lambda has convened an advisory committee of former leaders and key stakeholders to map the future of the group.

**COMMUNICATIONS AND TECHNOLOGY**

One of our key initiatives has been to make better use of our communications tools. We redesigned the layout of *USConnection*, our monthly e-newsletter, and switched our focus to alumni news, rather than rehashing university news. We also initiated plans to
expand *Around Town*, our regional newsletter, to our other priority regions. Both of these initiatives have garnered positive feedback from alumni leaders and colleagues.

We negotiated regular space in *Trojan Family Magazine*, beginning with the fall 2008 issue. This will greatly enhance our publicity efforts, as well as the magazine itself. We have also worked with University Public Relations to secure regular coverage of alumni relations in the *USC Chronicle*.

Next year, we will review our online community and website. Dana Randall will be leading our efforts and will be working with a consultant to solicit feedback from our own staff, campus partners, alumni leaders, and general alumni regarding our website’s utility, design and navigability, and make recommendations for improvements based on this feedback. As part of this initiative, we are also evaluating the efficacy of InSCircle, our online networking tool.

The maturation of our communications and technology programs is critical to the success of all of our programming, and I am confident we will make great strides in this area in the next year.

**GENERAL ADMINISTRATION**

*Facilities* – We have undertaken two main initiatives regarding our physical facilities. The first initiative was to redecorate the first floor of Alumni House to more accurately reflect and celebrate USC and the Trojan Family. We convened an advisory committee to consult on this project. We were lucky to identify a restricted gift we could use for this purpose, and we were even luckier that Sue McKeever, the chair of the Alumnae Coordinating Council, donated her interior design services. Renovations are expected to occur over the summer and Alumni House will “re-open” before the start of the next school year.

The second initiative was to secure additional space for our growing staff at University Village. We spent January and February transitioning our communications, marketing and technology groups to that space. We were also able to relocate our finance department back to Alumni House.

*Personnel* – I am very proud of the general progress our staff has made. I must commend my senior team; they have been very open-minded to new ideas, offered me advice and counsel and provided solid support for our growing program.

In consultation with senior managers, we promoted eight people to the new rank of associate director and defined seven program portfolios to promote greater responsibility. We also invested in professional development for this team, including hiring a coach to do training on responsibility and accountability, understanding our team dynamics and how we operate under stress. Future training sessions will focus on conflict resolution and volunteer management.

*Resources and budget* – With the able assistance and good humor of my senior staff, we assembled a complete office budget. The exercise was quite useful in terms of grasping the whole program and proposing a budget for next year. We will remain within budget this year, and we will be in a position to hire some additional staff and launch some of our planned new initiatives for next year.

In order to take advantage of more corporate sponsorship opportunities, we have revamped our sponsorship program. Our new program has more levels of support in it with a strong emphasis on creating custom partnerships. We are in the process of creating new sponsor packets and have already received inquiries from prospective partners about event and
program opportunities, including football programs for next fall.

**EPSTEIN FAMILY ALUMNI CENTER**

Thanks to the leadership of Alex Cappello, Michele Dedeaux Engemann and Len Fuller, the fundraising effort for the Epstein Family Alumni Center has been a huge success this year. To date, we have raised $6.5 million towards our goal of $7 million. This effort was led by USC Trustee Daniel Epstein and his family, who made a $4 million lead gift towards the center. We received additional naming gifts from the following individuals: J. Scott Watt ($400,000), Alexander and Linda Cappello ($250,000), Michele Dedeaux and Roger Engemann ($250,000), Christine Marie Ofiesh ($175,000), Steven and Sylvia Re’ ($150,000), Len and Linda Fuller ($100,000), and Otis and Barbara Healy ($100,000). We also received naming gifts from Town and Gown of USC ($200,000) and Trojan League of Los Angeles ($150,000).

We have used the Epstein Family Alumni Center to inspire giving initiatives among other groups. Those initiatives are as follows: $500,000 from the Alumni Presidents Council to name Alumni Commons, $500,000 from alumni who have served on the Board of Governors to name one of the marquis conference rooms, and $100,000 from the Class of 1958 to name the President’s Dining Room Patio. We are making significant progress on each of these and have secured new USC donors in each initiative.

**USC HISTORY PROJECT**

We made considerable progress on the USC History Project and Museum this year. We drafted a proposed timeline and framework for this project. We defined the USC History Project as including the USC History Stations, a virtual Trojan Family Scrapbook, virtual archives, the USC History Museum, and other ideas yet to be conceived.

With the crucial leadership of the USC Libraries and the dedication of our loyal volunteers, development of the scrapbook began this year, with hopes to publish it in fall 2008. Development of the virtual archives began this spring and will proceed, budget permitting. The focus is on items of record (*El Rodeo, Daily Trojan* and *Alumni Review*). Our plan is to integrate the scrapbook and archives into one USC History Project website by fall 2009.

The USC History Museum project will unfold over the next five years, including conception, fundraising and implementation. There are three main challenges in establishing the museum, which we will focus on resolving next year. The first is creating a volunteer structure capable of building support for the museum and keeping all parts of the project moving forward on schedule. The second is identifying a prospect pool for the estimated $5 million needed. The third is identifying and coordinating with parallel efforts across the campus to preserve USC history.

**SCHOLARSHIPS**

The USC Alumni Association and its affiliated groups are committed to the future alumni currently studying at USC. In support of that commitment, we distributed over $3.6 million in scholarships in 2007 and 2008 (including university matching funds).

The USC Alumni Association led the effort by distributing more than $850,000 in merit scholarships to 322 Scions in 2008. Thirty-four of our regional clubs collectively awarded $468,000 to 156 students. Seventeen alumnae groups collectively awarded $502,000 to 135 students. The APAA awarded $52,700 to 25 students. Lambda awarded $35,000 to eight students.

Our alumni leaders take a lot of pride in these scholarships and in the students who receive
them. They devote countless hours to interviewing students and to mentoring their awardees throughout their time at USC. These scholarship programs are a shining example of the ideals of the Trojan Family.

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The USC Alumni Association will maintain its progress on all the initiatives described herein next year. We will also undertake the following new initiatives:

- Implement USC Women’s Day
- Implement alumni reunion weekend with support from USC’s schools
- Implement stewardship for alumni who served on the BOG
- Implement alumni tailgates at home football games
- Evaluate and improve the online community and website
- Develop strategic plans for APAA and Lambda
- Secure $75,000 to $100,000 in new general sponsorships and $25,000-$50,000 in new event or program-specific sponsorships
- Collaborate with the Annual Fund on a regional-based scholarship mailing

In achieving these goals our only significant obstacle is our budget. The USC Alumni Association is underfunded, given the size of the alumni community we must engage, our ambitions to build a culture of philanthropy among our alumni, and the very nature of the Trojan Family itself. We will continue working with senior administration and key volunteers in our effort to secure new resources, both through our own efforts at fundraising and sponsorships, and from the university.

Another challenge facing the university and its alumni relations efforts is the state of the alumni database. By our estimates USC is missing contact information for over 85,000 alumni. We have raised this issue with appropriate colleagues and will urge the next vice president for advancement to make USC’s alumni database a top priority.

All the work described in this annual report is the work of many dedicated Trojans. Thank you to the hundreds of alumni volunteers, to colleagues across USC and to the staff of the USC Alumni Association for a year we can all be proud of.

After my first year as a member of the Trojan Family, I am confident that the USC Alumni Association has tremendous potential to engage all USC alumni for life, to build a culture of philanthropy in support of USC, and to gather a voice for USC alumni. Over the next several years we will unlock that potential together.

Fight On!

Respectfully submitted,

Scott M. Mory
USC Associate Senior Vice President for Alumni Relations

May 22, 2008